

# Cyclist skills training monitoring and evaluation framework

This framework aims to gain an understanding of the uptake and outcomes of the national cyclist skills training guidelines. The information will help ensure that the training meets the objectives in the 'Getting there - on foot, by cycle' strategy.



# New Zealand cyclist skills training

## Monitoring and evaluation framework

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# Definition of terminology

the NZTA	the NZ Transport Agency
CTOs	Cyclist training organisations
Target group	Group or organisation receiving the cyclist skills training
Grade 1	Non-traffic environment. Trainees can demonstrate skills for full bicycle control in non-traffic environments.
Grade 2	Traffic environment. Trainees can demonstrate skills to cycle in a variety of traffic environments.
Grade 3	Traffic environment. Trainees can demonstrate skills to cycle confidently in all traffic environments.

# 1 Introduction

## 1.1 Background

The development of cyclist skills training guidelines is one of seven initiatives in the 'Getting there – on foot, by cycle' National Walking and Cycling Strategy. The aim of the guidelines is to develop a consistent best practice approach for the delivery of cyclist training in New Zealand. The NZ Transport Agency (NZTA) hopes that the implementation of cyclist skills training under the guidelines will contribute to the vision of *a New Zealand where everyone has the opportunity to become a confident, capable cyclist*, and also the national strategy's vision of more people walking and cycling for transport and enjoyment.

As part of the development of the guidelines, the purpose of this report is to develop a monitoring and evaluation framework to ensure consistency in reporting for the delivery of the guidelines across New Zealand.

During 2009, the NZTA undertook a trial of the guidelines with a range of existing cyclist training providers across New Zealand. The trial provided feedback on the uptake, outcomes and ease of use/adaptability of the guidelines. This monitoring and evaluation framework was used to gather information and report on the outcomes of this trial. The framework will also form the basis for the ongoing monitoring and evaluation of cyclist skills training.

## 1.2 Objectives and purpose

The key objective of this framework is to provide guidance on gaining an understanding of the uptake and outcomes of the national guidelines. The framework will be used to provide feedback, track progress and identify issues with cyclist training organisations (CTOs) implementing programmes based on the national guidelines. The information gathered will be used to ensure that the New Zealand cyclist skills training programme meets the objectives in the 'Getting there – on foot, by cycle' strategy and leads to a New Zealand where more people are cycling for transport and recreation.

The purpose of this report is to:

- outline monitoring and evaluation requirements and provide tools to measure the uptake, outcomes and ease of use/adaptability of the New Zealand cyclist skills training guidelines
- satisfy the NZTA's reporting requirements on the uptake and outcomes of the New Zealand cyclist skills training programmes
- provide a range of other monitoring and evaluation tools for CTOs to monitor changes in knowledge and behaviour and the benefits of their programmes.

Note that this report framework does not include the requirements for the monitoring of cyclist training instructors – this component will be covered in the development of the cyclist skills instructor qualification.

## 1.3 Report structure

Section 2 gives an overview of what monitoring and evaluation is. Section 3 outlines the monitoring and evaluation approach and requirements for the delivery of cyclist training in New Zealand. Targets are identified in section 4, and section 5 details the monitoring and evaluation outputs.

At the end of the report is a list of templates for monitoring and evaluation, including set-up templates for pre-programme delivery and templates for ongoing monitoring and evaluation. The templates are available separately on the NZTA website.

## 2 What is monitoring and evaluation?

Monitoring and evaluation is a critical aspect of any project plan. It ensures that the objectives of the programme are achieved. Monitoring and evaluation is important for cyclist skills training as there is a requirement:

- from the NZTA to monitor the delivery of community programmes, eg did we do what we said we would do? is the programme achieving value for money?
- to evaluate the effectiveness and efficiency of cyclist skills training, eg was the activity successful?
- to feed back on the guidelines so that ongoing improvements can be made, eg what can we do better?

Monitoring and evaluation are two complementary but separate functions that serve distinct purposes. Monitoring is the routine ongoing assessment of activities applied to assess resources invested (inputs) in the programme and outcomes by the programme.

Programme evaluation (or evaluation) is an important component for learning how effective the programme has been and is used to inform future action. One of the key purposes of the evaluation is to improve ongoing programmes and/or improve the design and implementation of future programmes<sup>1</sup>. Specifically, the process involves the collection of data and the analysis of results to judge the success of the programme and identify improvements for next time.

Johnson and Wouters (2008) note that, to be effective, evaluation should follow five key principles:

- *Evaluation should be an integrated part of the planning and management of programmes.*  
The evaluation component must be incorporated into the development of the project plan when the cyclist training programme starts being delivered.
- *Evaluation should be a structured and planned process.*  
The evaluation component must be measured against clear goals and objectives of the project.
- *Evaluation design should reflect the purpose and audience of the evaluation, and the scale and significance of the project.*  
Evaluation design must reflect the type of information required by stakeholders. Note that it is better to evaluate fewer aspects of the programme well, rather than more aspects in a blanket approach.
- *Evaluation should, whenever possible, be a participatory activity.*  
Key stakeholders should be involved in the evaluation process. This can include instructors, trainees, parents (if applicable) and schools.
- *Evaluation needs to be respectful of the values, perspectives and rights of those involved.*  
There are risks that need to be considered for evaluation. Issues may include:
  - how different values and perspectives are treated in the evaluation
  - how and when confidentiality will be ensured.

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<sup>1</sup> A Johnson and M Wouters (2008) *A guide to evaluating Conservation with Communities Projects*, Technical Series 34, Science and Technical Publishing, Department of Conservation, Wellington.

## 3 Monitoring and evaluation approach

The monitoring and evaluation approach for the cyclist skills programme is based on a logic model (figure 3.1) that identifies how the inputs (or actions) are designed to feed into key short-, medium- and longer-term intended outcomes.

The framework has been designed for use in a variety of training environments and for a range of trainees. The framework applies to adults and children, and to training in schools, workplaces and community groups.

The monitoring and evaluation approach was initially adopted during the trialling process by CTOs in 2009. Now the trial has been completed, the NZTA is interested in continuing to monitor the uptake of cyclist training programmes across New Zealand on an annual basis. Therefore, CTOs are encouraged to monitor and evaluate their programmes following the guidance and reporting requirements in this framework.

The requirements for monitoring and evaluation focus on gathering the information required to assess progress toward achieving objectives under both the 'Getting there – on foot, by cycle' strategy and the vision of the guidelines. Appended to this report are the templates for CTOs to record this information.

This framework also provides a range of tools that we encourage CTOs to use for further monitoring and evaluation of their programmes. By receiving feedback from those involved in the training (parents, teachers, etc), CTOs can evaluate whether or not their programme is achieving the desired outcomes.

### 3.1 Reporting requirements

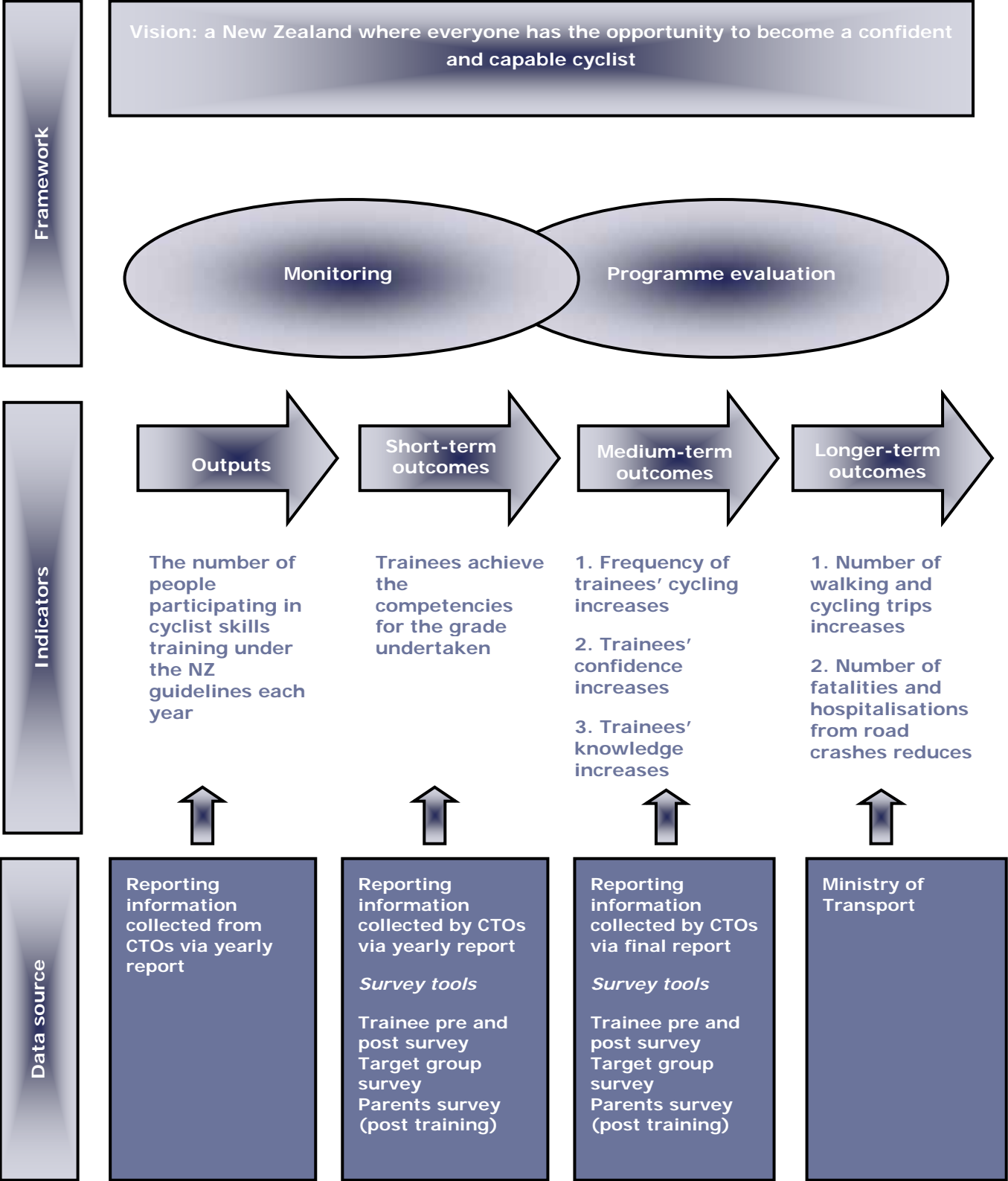
Recommended reporting components are detailed in the following sections. The required reporting satisfies the NZTA's reporting requirements to ensure the uptake and outcomes of New Zealand cyclist skills training programmes. The survey tools provide further information to measure changes in knowledge and behaviour and the benefits of programmes.

The NZTA proposes that monitoring and evaluation data be gathered from a combination of sources, including instructors, trainees, parents (if teaching children) and target groups (eg schools, adult training centres). The data will primarily be collected using written surveys, although instructors may wish to also work collectively using group information sessions to gather more information, if required.

#### Summary of the templates

- *Recommended*  
Yearly report (template 4)
- *Survey tools*  
Trainee pre and post training survey (template 6)  
Target group survey (template 7)  
Parent/caregiver survey (template 8)

Figure 3.1 Programme logic model



### 3.1.1 Requirements

#### Yearly report

Who by: CTOs

How often: annually

This reporting will involve gathering data on the following:

Area of focus	Source	Reporting tool
<ul style="list-style-type: none"> <li>Number of participants (trainees) in the programme (annually)</li> <li>Number of trainees by level (annually)</li> <li>Number of groups trained (annually)</li> <li>Number of trainees achieving the competencies for each level (annually)</li> <li>Costs associated with running the programme (annually)</li> <li>Percentage increase/decrease in cycling to school/work/university after the programme</li> </ul>	<p>CTOs' records (can use the record sheet in template 9 to record this information)</p> <p>Mode shift information can be gathered via pre and post surveys or by conducting 'hands up' surveys</p>	Yearly report (template 4)

The above information will be used to benchmark participation so that future progress can be measured. Data on the number of participants, trainees by level and trainees progressing will be used to monitor the uptake of the training programme and, over time, to identify trends. Information on mode shift and programme costs will also enable future possible cost-benefit analysis of individual programmes to be undertaken in accordance with the NZTA's *Economic evaluation manual*.

A record sheet has been supplied (template 9), which CTOs can use to record important details following each training course. The sheet is designed to keep a record of the information required for the yearly report. Gathering this throughout the year will make completing the yearly report a straightforward task. CTOs may wish to record this information electronically on an excel spreadsheet.

### 3.1.2 Survey monitoring and evaluation tools

#### Trainee pre and post survey

Who by: trainees

How often: prior to training, and at least three weeks after training

This survey enables CTOs to gather:

- mode shift data (required for the yearly report)
- information regarding trainees' knowledge of cycling and road rules before and after training
- information regarding trainees' confidence in riding a cycle in various environments before and after training.

While mode shift data is required in the yearly report, the use of the survey is optional, as CTOs may wish to gather this information via a 'hands up' survey before and after the training to determine mode shift amongst trainees.

The pre training survey must be undertaken prior to training, and the post training survey three weeks after the training has taken place to enable outcomes to be assessed. The NZTA recommends that the pre training survey is undertaken two weeks before the training to ensure that the trainee has not already been influenced by the upcoming cyclist training (eg through pre training newsletters stating the condition that a helmet should be in and general safety information).

If a 'hands up' survey on mode shift is being undertaken, the instructor may wish to do this on the day of training, as part of the introduction before training commences. The instructor would need to arrange for this to be surveyed again three weeks after training has been completed.

Where the training is part of a school holiday programme (or similar) and trainees have dispersed following the training, instructors may need to send out the post training survey for trainees to complete. In this case, instructors should ensure they have the trainees' contact details.

Area of focus	Source	Reporting tool
<ul style="list-style-type: none"> <li>• The frequency that trainees cycle before and after participating in a cyclist skills training programme administered under the guidelines</li> <li>• Mode shift from car driver or passenger to cyclist for commuter trips (to school/work/university)</li> <li>• The increase in knowledge of road rules and good cycling practice</li> <li>• The cycling competence of trainees after participating in a cyclist skills training programme administered under the New Zealand cyclist skills training guidelines</li> <li>• The cycling confidence of trainees both before and after participating in a cyclist skills training programme administered under the New Zealand cyclist skills training guidelines</li> </ul>	Trainees	Trainee pre and post survey form

**Parent/caregiver survey**

Who by: parents/caregivers of trainees  
 How often: three weeks after training

Where cyclist skills training is targeted at children, a written survey can be given to parents whose child/children participated in the training. This survey will ask questions relating to the parent's perceptions of their child's behaviour when cycling. Questions are also framed to encourage parents/caregivers to think about how their own perceptions and behaviour may or may not have changed as a result of their child undertaking the training (eg allowing their child to cycle to school when they previously had not).

Again, if the trainees were part of a school holiday programme or similar, contact details will need to be obtained so a parent/caregiver survey can be sent out three weeks after training.

Area of focus	Source	Reporting tool
<ul style="list-style-type: none"> <li>• Parent/caregiver's perception of an increase in their child's competence after participating in the training programme</li> <li>• Parent/caregiver's perception of an increase in their child's confidence after participating in the training programme</li> <li>• Parent/caregiver's perception of whether their child participating in the programme increased their own confidence in letting their child cycle on public roads</li> <li>• Parents/caregiver's perception of whether they encourage their child to cycle more after they participated in the programme</li> </ul>	Parents/ caregivers of trainees	Parent/caregiver survey (template 8)

### Target group survey

Who by: target group coordinator

How often: three weeks after training

The target group survey is another optional tool for evaluating the effectiveness of the training. It is to be completed by the group coordinator (eg head teacher, school holiday programme coordinator, adult training centre coordinator) three weeks after training has finished. The survey asks the coordinator to consider the impact the programme has had on trainees' cycling competence and confidence, as well as any measurable increases in cycling. As with the parent survey, questions are framed to get them thinking about how things may or may not have changed as a result of the cyclist skills training.

Where training is undertaken as part of a school holiday programme or similar, the target group coordinator may not be in a position to comment on increases in cycling or on improved cycling confidence and competence three weeks later, as trainees are likely to have gone back to school or work. The parent survey and post training survey would be the best ways to obtain this information in this case. Target group coordinators will still be able to comment on the quality of the programme however.

Area of focus	Source	Reporting tool
<ul style="list-style-type: none"> <li>• Target group perception of whether trainees participating in the programme have increased in cycling confidence</li> <li>• Target group perception of whether there are more trainees cycling after participation in the programme</li> <li>• Target group perception of whether trainees participating in the programme have improved in cycling competence</li> </ul>	Target group coordinator	Target group survey (template 7)

## 4 Targets

The NZTA recommends that CTOs use a combination of target setting and benchmarking to measure progress. Benchmarking means setting a standard for comparison. For cyclist skills training, this will involve using the data collected in the first year as a benchmark for the following year. A target is an objective with a measurable outcome or output (eg increase the number of people undertaking cyclist skills training per year). The target for cyclist skills training will be to achieve an increase in people cycling year on year.

At a higher level, cyclist skills training should generate outcomes that contribute to the vision contained in the 'Getting there – on foot, by cycle' strategy and in the *Government policy statement on land transport funding* (GPS).

Table 4.1 details the proposed targets and data sources for cyclist skills training under the New Zealand guidelines. It shows the topic on which data is being gathered, the target or benchmark, and the data source. The table is divided into outcomes that are required to be measured, and outcomes that are optional.

**Table 4.1** Targets for New Zealand cyclist skills training

Topic	Target	Data source
<b>Key targets to be measured</b>		
Participation in cyclist skills training	Annual participation in cyclist skills training increases	Programme reporting from CTOs (final report)
Frequency of cycling	Increase in trainees cycling to school/work/university	Pre and post training survey Parent/caregiver survey (optional) Target group survey (optional)
<b>Other targets</b>		
Knowledge	Increase in knowledge – the difference between the pre and post test marks is significantly greater	Pre and post training survey
Confidence	Increase in confidence riding on the road after training Parent/caregiver's perception of improved confidence of trainee when cycling	Pre and post training survey Parent/caregiver survey Target group survey
Competence	Trainees achieve the level of cyclist training Parent/caregiver's perception of improved cyclist skills Target group coordinator's perception of improved cyclist skills	Percentage of the trainees who undertake training and achieve the level Parent/caregiver survey Target group survey

## **5 Monitoring and evaluation outputs**

The purpose of the monitoring and evaluation is to measure the uptake, outcomes and ease of use of the New Zealand cyclist skills training guidelines. Yearly reports will provide feedback on the uptake and outcomes and report on the successes and challenges of the programmes and present case studies of the successful areas. This information can be used to support the case for cyclist training in New Zealand, by encouraging more schools, groups and individuals to get involved. The data collected will also enable economic evaluation of individual programmes to be undertaken, which can support the case for further funding.

# List of templates

The following templates are available from on the NZ Transport Agency's website:  
[www.nzta.govt.nz](http://www.nzta.govt.nz).

**Template 1** Letter to target group

**Template 2** Letter to parents/caregivers and consent form

**Template 3** Progress report form

**Template 4** Yearly report form

**Template 5** Trial evaluation survey

**Template 6** Trainee pre and post survey

**Template 7** Target group survey

**Template 8** Parent/caregiver survey

**Template 9** Record sheet